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TRENDS

CONSUMER ATTITUDES & THE SUPERMARKET

1986 UPDATE

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The Food Marketing Institute (FMI) is a non-profit association that conducts programs in research, education and public affairs on behalf of its 1500 members—food retailers and wholesalers and their customers. FMI's domestic member companies operate more than 17,000 retail food stores with a combined annual sales volume of $150 billion—half of all grocery sales in the United States. More than three-fourths of the FMI membership is composed of independent supermarket operators or small regional firms. Its international membership includes more than 150 members from 40 nations.

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INTRODUCTION

The present study is the fifteenth in a series of consumer attitudes surveys begun in 1974 by the Food Marketing Institute. Designed to identify the changing needs and priorities of the American consumer, *Trends 1986* continues to track and evaluate the major issues and trends from previous years, while adding coverage of new issues which are likely to capture the attention of consumers over the next several years.

This year's study continues the previous emphasis on nutrition, food safety and shopping behavior, and presents a comparison with previous years' data wherever possible. Among the main areas of interest are:

- Consumers' outlook on the economy, including personal expectations and predictions for price changes;
- Attitudes about supermarket responsibilities and evaluations of supermarkets' performance;
- Economizing and time-saving measures used while shopping; and
- Buying habits and shopping behavior.

In addition, this year's *Trends* includes an expanded section highlighting new products and services increasingly available in supermarkets. A new section examining home mealtime behavior has also been added. This includes:

- The source of meals not prepared at home;
- Entertaining; and
- Use of new recipes.

A demographic profile of the total sample, including weighted and unweighted percentages of major demographic groups, appears in the Methodology section.

Study Design

The data for this survey are based on telephone interviews with a representative nationwide sample of 1004 male and female supermarket shoppers conducted in January 1986. The sample was designed to be composed of 60 percent women and 40 percent men heads of households and was subsequently weighted to an 80 percent women and 20 percent men ratio to maintain comparability with previous studies in the *Trends* series.

A Note on the Tables

Presented directly beneath the title of each table is a description of the *base*; that is, the group of respondents for each question. The exact number of respondents in this base group, either in total or for subgroups, is provided for all nontrend tables. The percentages shown in each table are calculated using this base number. It should be noted that these percentages may not always add up to 100 percent due to rounding or the acceptance of multiple responses.

For some tables, the response categories are presented both separately (e.g., excellent, pretty good) and combined (e.g., excellent or pretty good). In some instances, the separate percentages may not add up to the combined percentages due to rounding.

For each table, the wording of the question as it was asked this year is provided. Any changes in wording from previous years are noted in the table.

Generally, the report presents findings for subgroups of interest. For many questions, analyses of subgroups have not been included in the report in the interest of focusing attention on the most significant findings. These additional analyses, as well as additional copies of the report, may be obtained from the Food Marketing Institute.

SURVEY HIGHLIGHTS

The following is an overview and summary of the most important findings of *Trends 1986.*

1. *Consumer optimism about future economic conditions remains at a high level.* Over one-third of those surveyed expect that their personal economic situation will improve in the next year. This level of optimism is roughly the same as it was in 1984 and 1985 and well above levels reported between 1981 and 1983. (Tables 2 and 3)

2. *Shoppers expect a greater increase in supermarket prices than in prices for most other products and services in the next six months.* This year 15 percent of shoppers said supermarket goods would get a good deal more expensive or that prices would rise sharply. This represents a four percentage point increase over last year. Compared to last year more shoppers expect sharp increases in gasoline prices, but the majority expect these prices to remain the same or decline. On the other hand, fewer shoppers expect to see large increases in interest rates and restaurant prices. Expectations about housing prices are the same as last year. Nineteen percent expect to see substantial price increases. (Table 4)

3. *Shoppers' perceptions of supermarket responsibilities remain high and relatively unchanged this year.* At least 75 percent of the shoppers — and up to 100 percent — expect supermarkets to be responsible for nine out of 11 services. There are five increases and six decreases in percentages over last year, but none changed more than four percentage points. (Table 5)

4. *Perceptions of supermarket responsibilities vary by shoppers' income.* Lower income shoppers are more likely to expect supermarkets to provide house brands or unbranded products, help them save money with specials, and help them pick the best value for their money. (Table 6)

5. *Supermarket performance in 11 key areas continues to be viewed quite positively.* Performance ratings were roughly 90 percent excellent or very good for eight out of those 11 items. The remaining three items received performance ratings of approximately 80 percent excellent or very good. (Table 7)

6. *The criteria used by shoppers in selecting a principal store at which to shop appear to be quite stable.* Last year, for the first time, shoppers were asked to provide their two or three most important considerations when making this decision. This year's findings indicate that price and location are still the predominant factors considered. A wide variety of products, courteous employees and cleanliness of store are respectively the third, fourth and fifth most often mentioned considerations, identical to last year's results. (Table 8)

7. *Weekly grocery expenditures showed a greater than average increase this year.* This year shoppers reported an average weekly expenditure of $74. This represents a nine percent increase over last year. In part this increase is due to a larger household size. This year shoppers reported an average household size of 3.06 as compared to 2.91 last year. As we move out of recession, the decrease in use of economizing techniques may have contributed to this increase. Also, shoppers may be including expenditures for non-food items, which are being increasingly purchased at supermarkets. (Tables 9, 10, and 11)

8. *Consistent with their larger weekly expenditures, shoppers report slight declines in the use of three out of four economizing measures this year.* Just one-fourth of all shoppers compare prices at different supermarkets "pretty much every time" they shop. Less than one in 10 shop at non-principal stores for advertised specials with this frequency. The use of price-off coupons increased from last year; however, last year's usage was well below the levels reported in either 1983 or 1984. (Table 12)

9. *Store loyalty also appears to be quite strong.* Over half of all shoppers (57 percent) visit only one supermarket a week. Of these shoppers, nine out of 10 report that they visit the same supermarket each week. (Tables 14, 15 and 16)

10. *Shoppers reported making fewer visits to supermarkets per week this year.* The average number of trips per week this year was 2.0. This average represents a decrease from the 2.3 average reported consistently for the four previous years. (Tables 17 and 18)

11. *The pattern of increasing use of time-saving techniques observed last year has continued this year.* Shoppers more frequently take packaged meats available rather than asking for special cuts. They more often look only at items they need. And to avoid frequent shopping, they buy in larger quantities. (Table 19)

12. *Supermarkets continue to play an expanded role in the total shopping experience.* This year for 10 out of 11 items the proportion of shoppers usually buying these items in the supermarket increased. Magazine buying changed most significantly. Now 45 percent of the shoppers usually buy magazines in supermarkets, up from 38 percent last year. (Table 20)

13. *This year fewer shoppers reported taking action as a result of supermarket dissatisfaction.* The most dramatic of the five decreases in six possible actions is the practice of returning products for a refund or exchange. Only 41 percent of the shoppers reported doing this, compared to 51 percent last year. (Table 21)

14. *Although shoppers' overall concern about nutrition has remained stable, specific concerns have increased this year.* Overall, 58 percent reported being very concerned about the nutritional content of what they eat this year. This is one percentage point below last year. More significant are the changes in level of concern for various shopper subgroups and the specific types of concerns mentioned. Families with children reported being less concerned about nutrition this year, whereas older shoppers and shoppers residing in rural areas reported a greater level of concern. Vitamin and mineral content has replaced sugar content as the most often mentioned specific type of nutritional concern. Concerns about fat and cholesterol content also increased this year. (Tables 22 and 23)

15. *This year there has been a return to self-reliance to be sure that products purchased are safe.* The proportion of shoppers who rely on themselves as individuals for food safety jumped 10 percentage points from last year to 48 percent. This represents a level similar to that reported in 1983 and 1984. Reliance on retailers dropped from six percent last year to just two percent this year. (Table 25)

16. *Compared to last year, more shoppers consider the presence of cholesterol and fat in food to be a serious health hazard.* Although residues such as pesticides and herbicides are most often considered a serious hazard (75 percent), cholesterol at 48 percent and fat at 44 percent are also perceived to be serious hazards by a substantial minority of shoppers. (Table 28)

17. *There is a wide range in the availability of 11 new products and services investigated this year.* Almost nine out of 10 shoppers reported that their supermarket carries unbranded or generic products (87 percent) or food products designed for microwave cooking (86 percent). Services reported least likely to be available are: home shopping and delivery service (seven percent), automated teller machines (33 percent) and food catering (38 percent). (Table 29)

18. *Generally, there is not a great deal of correspondence between the availability of new products and services and shoppers' demand for them.* For example, over a third of the shoppers who do not have automated teller machines say they would use them at least occasionally. Also, over half of shoppers whose supermarkets do not have delicatessen or other carry-out food items say they would at least occasionally buy this type of product if it were available. (Tables 31 and 32)

19. *When meals are eaten at home, but not prepared at home, they are most often purchased from a fast food store.* More than four out of 10 shoppers (43 percent) report that they usually buy prepared food at fast food stores. Only one shopper in 10 reported the use of the carry-out section of a supermarket for this type of meal. One- and two-person households are more likely to use a carry-out section of a supermarket than are larger households. (Table 33)

20. *Most shoppers report maintaining traditional dining practices.* More than seven out of 10 shoppers report that their families always or usually eat dinner together. More than six out of 10 report that they have the same main course when they eat together. Dinners where new recipes are tried or guests are entertained are only occasional or rare events for most shoppers. (Table 34)

CHAPTER 1

THE GENERAL OUTLOOK

The Economy and Future Expectations

Major economic indicators continued to demonstrate their previous strength. The average rate of inflation for all 12 months in 1985 dropped to 3.6 percent, almost dipping to the five-year low of 3.2 percent recorded for 1983. In addition, the rate of unemployment declined for the third consecutive year. By January 1, 1986, it had fallen to 6.7 percent, indicating that more Americans are currently employed than at any time in the past five years. In 1985 the Gross National Product reached 3,993 billion in actual 1985 dollars or 3,573 billion in 1982 dollars. Thus the GNP, in constant dollars, was slightly higher in 1985 than in 1984.

Table 1 **THE ECONOMY: 1981-1985**

	1981	1982	1983	1984	1985
Gross National Product[1]	$32.5	$31.7	$32.8	$34.9	$35.7
Inflation[2]	10.4%	6.1%	3.2%	4.3%	3.6%
Unemployment[3]	8.6%	10.4%	8.0%	7.4%	6.7%

[1] Gross National Product is listed in hundreds of billions, constant 1982 dollars.

[2] Inflation is as measured by the consumer price index twelve-month average.

[3] Unemployment figures are for the civilian population taken from January of the succeeding year; e.g., 8.6 percent is the reading taken in January 1982 and 6.7 percent is the value for January 1986.

Americans seem to view their economic future positively. In January of 1986, more than one out of three (34 percent) shoppers expected their personal economic situations to improve, while 15 percent expected their situation to get worse, and just under half (49 percent) expected their situation to stay the same. More shoppers seemed confident enough to express a view (98 percent) than at any time in the past five years, perhaps reflecting the perceived stability of the economy. Only two percent responded that they were "not sure."

To some extent, the degree of optimism expressed by shoppers varies by demographic subgroups. There continues to be a direct relationship between age and the perceived likelihood of improvement in personal economic situation. The most optimistic shoppers are those aged 18 to 39, almost half of whom (46 percent) expect their personal economic situation to improve. Those aged 65 and older are the least optimistic. Only 13 percent expected improvements; most (56 percent) expected their own economic situation to remain the same.

The current level of household income is also related to degree of optimism. In the highest income group (those with a household income of $25,000 a year and over) 43 percent expect improvement compared with 24 percent of those in the lowest income group ($7,500 or less a year), and 17 percent of those in the second lowest income group (those with household incomes between $7,501 and $15,000).

Table 2 **EXPECTATIONS FOR NEXT YEAR'S PERSONAL ECONOMIC SITUATION: 1981-1986**

Base: The shopping public

Q.: Looking at the situation personally, do you think your own economic situation will improve in the next year, get worse, or remain about the same?

	Total					
	Jan. 1981	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	**Jan. 1986**
	%	%	%	%	%	%
Improve	28	28	26	34	33	34
Get worse	26	25	23	15	14	15
Remain about the same	40	43	48	48	46	49
Not sure	5	4	4	3	6	2

Table 3

HOW SUBGROUPS COMPARE IN THEIR EXPECTATIONS FOR NEXT YEAR'S PERSONAL ECONOMIC SITUATION

Base: The shopping public

Q.: Looking at the situation personally, do you think your own economic situation will improve in the next year, get worse, or remain about the same?

			1986			
	Base		Improve	Get Worse	Remain About the Same	Not Sure
Total	**1004**	**%**	**34**	**15**	**49**	**2**
Size of Family						
1	123	%	31	18	46	5
2	328	%	32	18	48	1
3-4	406	%	36	13	50	1
5 and over	142	%	35	14	50	1
Age						
18-24 years	78	%	46	10	42	2
25-39 years	386	%	46	8	45	*
40-49 years	180	%	34	16	49	2
50-64 years	216	%	20	25	53	2
65 and older	116	%	13	26	56	5
Income						
$7,500 or less	87	%	24	28	43	5
$7,501-$15,000	143	%	17	25	58	1
$15,001-$25,000	195	%	32	17	48	3
$25,001 and over	519	%	43	8	49	*
Region						
East	250	%	36	13	50	2
Midwest	251	%	31	21	48	1
South	311	%	31	15	52	2
West	192	%	41	12	45	2
Size of Place						
Central city	304	%	38	13	46	2
Remainder of metropolitan area	459	%	36	13	50	1
Outside metropolitan area	241	%	26	22	50	2
Race						
White	837	%	35	14	50	2
Black	67	%	23	26	51	0
Hispanic	71	%	30	20	48	2

*Less than 0.5 percent.

Several geographic factors also affect the degree of optimism expressed. Shoppers living in the West (41 percent) and East (36 percent) have a more positive view than those in other areas in the United States (31 percent). And those living in a major metropolitan area (38 percent) reflect considerably more optimism than do those living in rural areas (26 percent).

Price Changes Expected

Shoppers expect modest price increases equivalent to those expected last year for most goods and services, with housing being the main exception. As was the case last year, 19 percent expect housing costs to rise sharply or to become a good deal more expensive in the next six months.

But, expectations of supermarket prices reflect less stability. Compared to last year's low of 11 percent, 15 percent said they expect supermarket prices to become a good deal more expensive or to rise sharply. However, this still contrasts favorably with the 21 percent reported in 1984. Gasoline prices also demonstrate a four percentage point increase from five percent to nine percent in those who expect prices to rise sharply or to become a good deal more expensive, although the majority of shoppers still expect prices to remain the same or decrease (55 percent). Expectations about interest rates and restaurant prices showed a slight (one percent) decline in those expecting a dramatic increase, to nine percent for interest rates and eight percent for restaurant prices.

Table 4 **PRICE CHANGES EXPECTED IN NEXT SIX MONTHS: 1983-1986**

Base: The shopping public

Q.: What do you personally think will happen to (READ EACH ITEM) in the next six months — will it get a little cheaper, stay the same, get a little more expensive, get a good deal more expensive, or rise sharply?

		Jan. 1983	Jan. 1984	Jan. 1985	January 1986				
		A Good Deal More Expensive/ Rise Sharply	A Good Deal More Expensive/ Rise Sharply	A Good Deal More Expensive/ Rise Sharply	A Good Deal More Expensive/ Rise Sharply	A Little More Expensive	Stay the Same	A Little Cheaper	Not Sure
The cost of housing	%	19	23	19	19	38	28	11	4
Supermarket prices	%	15	21	11	15	59	21	4	1
Interest rates	%	x	x	10	9	29	34	24	5
Restaurant prices	%	13	10	9	8	51	35	2	4
Gasoline prices	%	23	8	5	9	31	33	22	4

x = Not previously asked.

CHAPTER 2

THE CONSUMER'S VIEW OF THE SUPERMARKET

Responsibilities of Supermarkets

Shoppers continue to expect a great deal from supermarkets. The same as in the past, four of 11 possible services are said to be the supermarket's responsibility by at least 19 out of 20 shoppers. For nine items out of the 11, more than three-fourths of the shoppers viewed the service as the responsibility of supermarkets. A single item – making sure their employees give good service to their customers – was viewed as the responsibility of supermarkets by 100 percent of shoppers queried.

Comparing this year's results with those of the past three years allows one to see remarkable stability in the shoppers' views of the supermarket's responsibility. Throughout this period the largest annual percentage point change is four points, and most changes have been only one or two points.

Table 5 **HOW SHOPPERS VIEW SUPERMARKET RESPONSIBILITIES**

Base: The shopping public

Q.: Do you feel that supermarkets are responsible for (READ EACH ITEM) or don't you feel that's their job?

	Jan. 1983 Total %	Jan. 1984 Total %	Jan. 1985 Total %	**Jan. 1986 Total %**
Supermarkets are responsible for:				
Making sure their employees give good service to their customers	97	98	99	100
Getting you through checkout quickly	95	96	96	98
Having readable and accurate shelf tags	94	95	97	96
Making sure you don't buy old, stale, or spoiled products	91	93	93	95
Keeping your favorite products in stock	87	88	90	88
Making shopping easier and more pleasurable	88	89	90	87
Helping you by having a wide variety of items for one-stop shopping	80	83	85	82
Providing you with cheaper house brands or unbranded products	76	76	75	78
Helping you save your money with their specials	75	76	80	76
Helping you pick the best value for the money	49	49	50	48
Providing nutrition and health information	37	38	36	37

Generally, the proportion of shoppers who consider these services to be the responsibility of supermarkets does not vary greatly by demographic subgroup. The greatest variability is by income group with regard to those items which focus on saving money. For the three services related to saving money, shoppers at lower income levels are generally more likely to feel that supermarkets are responsible for providing these services. The greatest difference (24 percentage points) is in "helping you pick the best value for the money," where 63 percent of those with household incomes of $7,500 contrasted with 39 percent of those at the $25,000 or more level feel the supermarket is responsible. The smallest difference (seven percentage points) is in "providing you with cheaper house brands or unbranded products," where 80 percent of those with household incomes of $7,500 or less and 73 percent of those over $25,000 feel that supermarkets are responsible.

Table 6 **HOW SHOPPERS IN DIFFERENT INCOME GROUPS VIEW SUPERMARKETS' MONEY-SAVING RESPONSIBILITIES**

Base: The shopping public

Q.: Do you feel that supermarkets are responsible for (READ EACH ITEM) or don't you feel that's their job?

	1986				
		INCOME			
	Total	$7,500 Or Less	$7,501 To $15,000	$15,001 To $25,000	$25,001 and Over
Base:	1004	87	143	195	519
	%	%	%	%	%
Supermarkets are responsible for:					
Providing you with cheaper house brands or unbranded products	78	80	83	79	73
Helping you save your money with their specials	76	81	79	79	73
Helping you pick the best value for the money	48	63	59	50	39

Rating Supermarket Services

In addition to asking shoppers whether they feel supermarkets are responsible for providing 11 services, *Trends* also asked how good a job supermarkets are doing in providing these services. Among shoppers who feel that supermarkets are responsible for each item, ratings of the quality of supermarket services are essentially unchanged from last year. Ratings on three items have increased slightly, ratings on five items have decreased, and ratings on three items remain the same as last year. Compared to 1983, ratings are higher this year for 10 out of the 11 items. The greatest overall increase, however, has been small (eight percent).

- The single most dramatic change in ratings from last year to this year has occurred for providing nutrition and health information. Last year 72 percent of shoppers who considered this service to be the responsibility of supermarkets felt that supermarkets did an excellent or pretty good job of providing this information. This year's rating has increased six percentage points to 78 percent. None of the other ratings changed by more than three percentage points.

Generally, consumer ratings of these 11 services vary by the sex of the principal shopper. The greatest difference between women and men shoppers is in the rating of "Helping you pick the best value for the money." Seventy-seven percent of the male principal shoppers who feel the supermarket is responsible rate their usual supermarket as doing a good or excellent job versus 91 percent of women. The smallest disparity (two percentage points) between men and women principal shoppers is in "Keeping your favorite products in stock." In all instances, women principal shoppers feel more positively toward the job the supermarket is doing in providing service than do men principal shoppers.

Table 7

HOW SHOPPERS RATE SUPERMARKET SERVICE

Base: Those in the shopping public who feel supermarkets are responsible for each item

Q.: Do you feel that the supermarket in which you usually shop does an excellent, pretty good, not very good, or poor job of (READ EACH ITEM)?

				January 1986		
	Jan. 1983	Jan. 1984	Jan. 1985		Principal Shoppers	
	Total	Total	Total	Total	Men	Women
	%	%	%	%	%	%
Supermarkets Do an Excellent or Pretty Good Job of:						
Helping you by having a wide variety of items for one-stop shopping	92	95	94	93	89	94
Making shopping easier and more pleasurable	91	93	94	93	90	94
Keeping your favorite products in stock	92	92	92	92	90	92
Making sure you don't buy old, stale, or spoiled products	90	90	90	92	88	93
Helping you save your money with their specials	88	91	92	91	87	92
Making sure their employees give good service to their customers	90	92	94	91	85	91
Helping you pick the best value for the money	86	88	89	89	77	91
Providing you with cheaper house brands or unbranded products	86	89	89	88	80	90
Having readable and accurate shelf tags	81	84	83	84	79	85
Getting you through checkout quickly	80	79	83	83	74	84
Providing nutrition and health information	70	78	72	78	69	80

Selecting A Supermarket

Last year's *Trends*, for the first time, asked shoppers to volunteer the two or three most important considerations when selecting a supermarket as their principal store in which to shop. This year the two factors considered by better than four out of 10 shoppers are close location (41 percent) and low prices (41 percent). A third key consideration is a variety of brands and a wide selection of products, mentioned by almost one third of all shoppers (31 percent). Shoppers also expect stores to have courteous, friendly employees (23 percent) and to be clean (20 percent). These responses are quite similar to those expressed last year.

Across all age groups, price and location are the two most frequently mentioned considerations. Shoppers under 40 mention these more often than do those in the higher age groups. Encountering courteous, friendly employees is more important (30 percent) to those aged 65 and over than to those who are younger. The youngest shoppers, those aged 18 to 24, consider fast checkout (19 percent) and keeping the shelves well stocked (10 percent) more important than do those who are older. Generally, it seems that younger shoppers consider a wider range of factors when selecting a supermarket than do older shoppers.

Table 8 **THE MOST IMPORTANT FEATURES OF SUPERMARKETS (Volunteered)**

Base: The shopping public

Q.: Thinking about the supermarket in which you usually shop, what were the two or three most important considerations when selecting this supermarket as your principal store to shop at? What else?

			Age				
	Jan. 1985 Total	Jan. 1986 Total	18-24 Base	25-39 Base	40-49 Base	50-65 Base	65 and Over Base
Base	1005	1004	78	386	180	216	116
	%	%	%	%	%	%	%
Good/low prices	43	41	47	48	37	40	33
Location/close to home/local	42	41	45	45	40	37	34
Variety, wide selection	35	31	27	34	32	28	29
Courteous, friendly employees	25	23	24	20	27	23	30
Clean store	23	20	10	23	24	21	11
Fresh produce/fruits and vegetables	13	12	14	11	16	11	9
Fast checkout	13	11	19	13	11	10	4
Good/better/fresh meat	12	11	8	11	11	14	9
Good service	11	5	5	5	7	5	4
Items on sale, money-saving specials	11	9	14	9	6	10	7
Quality products	8	9	6	7	10	13	12
Fresh products	3	5	8	5	5	5	5
Convenient layout of store	7	4	1	3	3	7	3
Keep shelves well stocked	4	4	10	5	5	2	2
Convenience (nonspecific)	4	4	4	4	2	4	5
Familiarity	4	4	4	2	4	5	8
Better store hours, longer hours	3	4	4	6	3	1	3
Coupons	2	4	5	4	2	4	5
Convenient parking	3	3	1	1	3	7	2
One-stop shopping	3	3	0	5	3	2	4
Nice appearance	3	2	1	2	1	2	4
Items clearly marked for price	2	2	2	2	1	2	1
Check cashing	2	2	0	2	2	1	3
Wide aisles	2	2	2	1	4	3	0
Grocery carry-out service	2	1	2	1	1	1	3
Generic/unbranded products	1	1	2	1	2	0	0
Have advertised items in stock	1	1	0	1	0	0	0

CHAPTER 3

SPENDING AND SAVING MONEY

The Weekly Grocery Bill

For the past four years, reported average weekly grocery expenses for a family have increased at a fairly stable rate, ranging from a low of $58 in 1982 to a high of $68 last year. This year's figure of $74 represents an annual increase greater than the previous trend. The most dramatic increase occurred for families of five or more, where the reported average expenditure went from $92 last year to $103 this year. Two-person households reported an average weekly expenditure increase of $4, rising to $62 from $58 last year.

The per-person average weekly expenditure also reflects a larger increase than in the past. In each year from 1982 to 1985, the per-person increases have been one dollar per year. During the past year the increase was $3, bringing per-person expenditures to $27 weekly. The increase is the greatest for persons living in a central city (a $5 increase to $29) and for those in the Midwest (a $4 increase to $25).

Looking at all subgroups, the highest per-person expenditure is found in the single-person household ($41). Households with no children and those in which men are the principal shopper spend $5 more than the average weekly per-person rate of $27. The smallest average weekly per-person expenditure is found in households with five or more people ($19).

There are several possible explanations for this year's increase in average weekly grocery expenses. First, total family expenses are dependent on the number of persons per household. This year shoppers reported an average household size of 3.06, up from an average of 2.91 last year. Also, shoppers reported decreased use of economizing measures and increased use of time-saving measures. Both of these changes in behavior could result in higher expenditures. Lastly, shoppers continue to report increased purchase of non-food items at supermarkets. Even though shoppers were asked their average grocery expenditures, it is possible that non-food items are included in these self-reported figures. It should also be noted that these figures, because they are based on self-reports and not grocery sales receipts, may vary somewhat from actual expenditures.

Table 9 **WEEKLY FAMILY GROCERY EXPENSES: 1982-1986**

Base: The shopping public

Q.: About how much do you spend each week on groceries for your family?

	Total				
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	**Jan. 1986**
	%	%	%	%	%
$0-$40	30	28	23	23	19
$41-$60	25	29	29	27	28
$61-$100	30	33	34	34	38
$101 and over	8	9	9	12	13
Not sure/no answer	7	1	4	4	3
Average weekly* grocery expenses	$58	$62	$64	$68	$74

*This year's average was calculated using a disaggregated mean. Prior years' figures have been adjusted to be computationally equivalent.

Table 10 AVERAGE WEEKLY FAMILY GROCERY EXPENSES FOR DIFFERENT SIZE FAMILIES: 1982-1986

Q.: About how much do you spend each week on groceries for your family?

	Total				
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	**Jan. 1986**
Size of Family	$	$	$	$	$
1	33	36	40	40	41
2	51	54	59	58	62
3	70*	72*	71	76	76
4	70*	72*	80	85	84
5 or more	90	85	82	92	103

*Expenses for 1982 and 1983 are for three and four person families combined.

Table 11 AVERAGE PER-PERSON WEEKLY GROCERY EXPENSES: 1982-1986

Base: The shopping public

	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	**Jan. 1986**
Total	**$21**	**$22**	**$23**	**$24**	**$27**
Principal Shoppers					
Men	$23	$23	$28	$28	$32
Women	$21	$22	$22	$23	$26
Married					
One spouse at home	$20	$20	$22	$23	$25
Two wage earners	$22	$22	$23	$23	$26
Size of Family					
1	$33	$36	$40	$40	$41
2	$26	$27	$29	$29	$31
3-4	$20	$21	$22	$23	$23
5 and over	$17	$16	$15	$17	$19
Type of Family					
With children	$19	$19	$19	$21	$21
No children	$25	$28	$28	$29	$32
Region					
East	$23	$22	$23	$25	$28
Midwest	$20	$20	$22	$21	$25
South	$20	$24	$23	$24	$26
West	$23	$24	$24	$26	$27
Size of Place					
Central city	$21	$22	$24	$24	$29
Remainder of metropolitan area	$23	$23	$24	$25	$27
Outside metropolitan area	$20	$22	$21	$21	$24

Saving Money

This year's *Trends* once again reveals a consistent pattern of less frequent use of economizing measures by shoppers. Three of the four economizing measures about which shoppers were asked indicated a lower rate of use than was recorded in 1985, continuing a decline in use of such measures since 1983 for three out of the four items.

Shoppers most often report that they look in the newspaper for grocery specials (40 percent) and use price-off coupons (39 percent) pretty much every time they shop. Looking in the newspaper for specials has declined by 12 percentage points in four years while coupon use remained stable.

Shoppers are considerably more likely to use measures which can be performed in the home than to engage in practices involving travel in order to save money when shopping in the supermarket. One out of four (25 percent) shoppers report comparing prices at different supermarkets "pretty much every time." Only nine percent report going to supermarkets other than their principal one for advertised specials "pretty much every time" while 23 percent report that they never engage in this practice.

Patterns of use of these economizing strategies differ substantially between men and women as well as between working and nonworking women. Men are the least likely to use any of these money-saving strategies, while nonworking women are the most likely. Just under one-third (32 percent) of men report looking in the newspapers for grocery specials pretty much every time they shop compared to 35 percent of working women and half (50 percent) of nonworking women. A similar pattern emerges with respect to using price-off coupons. Almost one-third of men shoppers use coupons pretty much every time they shop, but this percentage increases to 38 percent among working women and 42 percent among nonworking women. Nonworking women are also most likely to compare prices at different supermarkets (30 percent) and to go to other supermarkets for advertised specials (13 percent).

The other major influence on the use of economizing measures is annual family income. With the exception of using price-off coupons, the use of economizing measures was reported considerably more frequently by shoppers from families at lower income levels. Almost half (48 percent) of all shoppers with incomes of $7,500 or less report that they look in the newspaper for grocery specials pretty much every time they shop. This is 12 percentage points higher than the 36 percent figure for shoppers in the highest income group. Similarly, shoppers in the lowest income category are almost twice as likely as the highest income group to compare prices at different supermarkets (37 percent vs. 20 percent). They also more frequently shop at non-principal stores for advertised specials (14 percent vs. eight percent).

Table 12 **HOW OFTEN SHOPPERS USE SUPERMARKET SPECIALS, COUPONS, AND PRICE COMPARISONS**

Base: The shopping public

Q.: How often do you (READ EACH ITEM) – pretty much every time you shop, fairly often, only occasionally, or never?

		1983	1984	1985	1986				
		Pretty Much Every Time	Pretty Much Every Time	Pretty Much Every Time	Pretty Much Every Time	Fairly Often	Only Occasionally	Never	Not Sure
Look in the newspaper for grocery specials	%	52	49	41	40	19	24	16	*
Use price-off coupons	%	38	39	30	39	17	32	12	*
Compare prices at different supermarkets	%	30	29	27	25	23	35	17	*
Go to supermarkets other than your principal one for advertised specials	%	13	12	10	9	16	51	23	*

*Less than 0.5 percent.

Table 13

HOW SHOPPER SUBGROUPS VARY IN THEIR USE OF SUPERMARKET SPECIALS, COUPONS, AND PRICE COMPARISONS

Base: The shopping public

Q.: How often do you (READ EACH ITEM) – pretty much every time you shop, fairly often, only occasionally, or never?

	Jan. 1986 Total	Men	Working Women	Non-working Women	$7,500 or Less	$7,501 to $15,000	$15,001 to $25,000	$25,001 or Over
Base	1004	404	302	298	87	143	195	519
	%	%	%	%	%	%	%	%
Pretty Much Every Time:								
Look in the newspaper for grocery specials	40	32	35	50	48	49	42	36
Use price-off coupons	39	32	38	42	40	29	38	42
Compare prices at different supermarkets	25	22	21	30	37	31	25	20
Go to supermarkets other than your principal one for advertised specials	9	8	7	13	14	10	10	8

CHAPTER 4

SHOPPING PATTERNS

This year's *Trends* continues to show movement toward visiting just one supermarket during the course of a week, reported by 57 percent of shoppers. Although the average of 1.5 different supermarkets visited per week remains the same as in 1985, only seven percent of shoppers report visiting three or more different supermarkets. There is a slightly greater tendency on the part of male principal shoppers (38 percent) to visit two supermarkets than when principal shoppers are women (34 percent).

Those shoppers who report visiting a single supermarket during the course of a week demonstrate remarkable loyalty to the supermarket at which they shop. Nine out of 10 of these shoppers (90 percent) report usually using the same supermarket each week rather than visiting different ones. There are small subgroup differences such that 92 percent of working women, 89 percent of men, and 87 percent of nonworking women use the same supermarket repeatedly.

The average overall number of trips to any supermarket during a week -- whether to the shopper's principal supermarket or to a different one -- has declined from a stable 2.3 for each year since 1982 to 2.0 in 1986. This downward trend is most clearly visible in the percentage of shoppers reporting more than three trips weekly, down from 17 percent last year to 12 percent this year. The proportions reporting a single weekly visit (31 percent) and two visits weekly (34 percent) have each risen two percentage points over last year.

The youngest shoppers, those aged 18 to 24 years, visit supermarkets most frequently, reporting an average of 2.6 visits each week. The next most frequent shoppers are aged 65 and over, making an average of 2.2 visits per week. Shoppers in the middle age ranges, who are most likely to be employed full time, shop somewhat less frequently. Those in the 50- to 64-year-old range make the fewest trips to the supermarket each week (1.9) and have the highest proportion of shoppers reporting one trip each week (38 percent).

Table 14 **NUMBER OF DIFFERENT SUPERMARKETS SHOPPERS USE: 1982-1986**

Base: The shopping public

Q.: About how many different supermarkets do you usually visit in a week to do your weekly shopping?

	Total				
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	**Jan. 1986**
	%	%	%	%	%
1	56	50	51	56	57
2	34	37	37	35	36
3	8	11	9	7	5
4 or more	1	2	1	2	2
Average number of different supermarkets visited per week	1.5	1.6	1.6	1.5	1.5

Table 15 NUMBER OF DIFFERENT SUPERMARKETS SHOPPERS USE

Base: The shopping public

Q.: About how many different supermarkets do you usually visit in a week to do your weekly shopping?

	Jan. 1986	Principal Shoppers	
	Total	Men	Women
	1004	181	540
	%	%	%
Number of Supermarkets			
1	57	55	59
2	36	38	34
3	5	5	5
4 or more	2	2	2
Average number of different supermarkets visited per week	1.5	1.5	1.5

Table 16 STORE LOYALTY

Base: Shoppers who visit only one supermarket in a week.

Q.: Is this the same supermarket each week, or do you visit different ones from week to week?

	Jan. 1986 Base		Same Each Week	Different	Not Sure
Total	**548**	%	**90**	**10**	*
Men	197	%	89	10	2
Women	351	%	90	10	*
Working	184	%	92	8	0
Nonworking	167	%	87	12	1

*Less than 0.5 percent.

Table 17 **HOW OFTEN SHOPPERS GO TO THE SUPERMARKET IN AN AVERAGE WEEK: 1982-1986**

Base: The shopping public

Q.: About how many visits do you make to the supermarket in an average week — that includes going to the same store more than once and going to different stores?

	Total				
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	**Jan. 1986**
	%	%	%	%	%
1	31	31	31	29	31
2	32	34	31	32	34
3	20	20	20	20	20
4	7	8	8	9	6
5	3	3	4	4	4
6 or more	3	3	3	4	2
Every 2 weeks	1	*	2	2	1
Average number of supermarket visits per week	2.3	2.3	2.3	2.3	2.0

*Less than 0.5 percent.

Table 18 **HOW OFTEN SHOPPERS GO TO THE SUPERMARKET**

Base: The shopping public

Q.: About how many visits do you make to the supermarket in an average week — that includes going to the same store more than once and going to different stores?

	Jan. 1986	Age				
	Total	18-24 Years	25-39 Years	40-49 Years	50-64 Years	65 and Over
Base	1004	78	386	180	216	116
	%	%	%	%	%	%
Number of Visits						
1	31	23	29	26	38	34
2	34	31	36	32	35	30
3	20	26	18	26	18	24
4	6	8	8	7	4	3
5	4	1	5	6	2	2
6 or more	2	4	2	2	2	2
Every two weeks	1	2	1	1	1	2
Average number of visits to supermarket per week	2.0	2.6	2.0	2.1	1.9	2.2

Saving Time in the Supermarket

Once again, shoppers report an increase in the use of time-saving practices in the supermarket, in addition to shopping less frequently. The most frequently used strategies reported being used by at least three out of 10 shoppers "pretty much every time" are:

- Taking packaged meat available rather than asking for a different cut (41 percent);
- Looking only at the items you know you need (38 percent);
- Buying larger quantities to avoid frequent shopping (33 percent); and
- Going to the supermarket at a particular time of day to avoid crowds (31 percent).

"Looking only at the items you know you need" is used at least occasionally by fully 91 percent of shoppers.

Since 1983, there has been an increase in those saying they use seven of the nine time-saving techniques pretty much every time. The greatest overall increases have been in taking packaged meat available rather than asking for a different cut (from 33 percent to 41 percent), in buying larger quantities to avoid frequent shopping (from 28 percent to 33 percent) and in shopping at a particular supermarket because it has a better or faster checkout system (from 23 percent to 27 percent).

Table 19 **HOW SHOPPERS SAVE TIME IN THE SUPERMARKET**

Base: The shopping public

Q.: People do different things to save time when shopping. For each of the following, please tell me how often you personally do this to save time when grocery shopping. Do you (READ EACH ITEM) pretty much every time you shop, fairly often, only occasionally, or never?

		1983	1984	1985	1986					
		Pretty Much Every Time	Pretty Much Every Time	Pretty Much Every Time	Pretty Much Every Time	Fairly Often	Only Occa-sion-ally	Never	Doesn't Apply (Vol.)	Not Sure
Take packaged meat available rather than ask for a different cut	%	33	38	37	41	21	22	12	4	*
Look only at the items you know you need	%	36	33	34	38	29	24	8	*	1
Buy larger quantities to avoid frequent shopping	%	28	30	31	33	25	28	13	1	*
Go to the supermarket at a particular time of day to avoid crowds	%	30	28	31	31	21	25	23	1	*
Shop at a particular supermarket because it has a better or faster checkout system	%	23	24	29	27	19	26	25	3	1
Shop at a particular supermarket because it's less crowded	%	15	15	17	16	14	32	36	2	1
Buy certain brands because they're more visible and easier to find	%	12	10	13	14	15	38	32	1	1
Buy only enough to use the quick checkout line	%	5	5	6	5	9	50	33	2	*
Go to a convenience store rather than a supermarket	%	3	4	3	3	8	50	38	*	*

*Less than 0.5 percent.

Supermarkets vs. Other Stores

This year's *Trends* indicates that one of the important considerations for shoppers in selecting a supermarket continues to be the wide variety of products from which to choose. This is supported by the high proportion of shoppers who report usually shopping at supermarkets for both a wide variety of food items and for other products. For 10 of the 11 items about which shoppers were asked both last year and this year there is an increase in the proportion of shoppers buying these items from supermarkets.

This year for the first time since this question was introduced a non-food item, magazines, represented the largest increase, from 38 percent last year to 45 percent. At least six out of 10 shoppers usually purchase paper goods (60 percent), fresh seafood (62 percent) and bakery goods (76 percent) in supermarkets. Nonprescription drugs are usually bought in supermarkets by one-third of shoppers (33 percent), an increase of four percentage points in two years. Even the two product categories least likely to be usually purchased in supermarkets, prescription drugs (seven percent) and toys (three percent), showed a slight gain in supermarket sales in the past year.

Table 20 **WHERE CONSUMERS USUALLY SHOP FOR VARIOUS ITEMS**

Base: The shopping public

Q.: Please tell me where you would usually shop for each of the following items — a supermarket, a convenience store, an all-purpose drugstore, or a discount department store?

		1982	1984	1985	1986					
		Super-market	Super-market	Super-market	Super-market	Convenience Store	Drug-store	Discount Store	Don't Shop	Other
Bakery goods	%	x	71	75	76	1	*	1	3	18
Fresh seafood	%	x	53	64	62	1	*	*	8	27
Paper goods	%	61	55	57	60	3	10	22	*	4
Magazines	%	37	35	38	45	5	18	8	12	10
Nonprescription drugs	%	x	29	30	33	2	46	14	2	1
Flowers and plants	%	x	23	26	28	3	2	23	6	37
Health and beauty aids	%	23	21	23	24	2	39	29	2	4
Greeting cards	%	12	13	15	18	4	35	24	1	16
Household repair and houseware items	%	10	15	13	16	3	3	55	2	19
Prescription drugs	%	4	6	6	7	*	83	4	1	4
Toys	%	x	x	2	3	2	3	68	11	12

x = Not asked in 1982 or 1984.
*Less than 0.5 percent.

Responses to Dissatisfaction

This year's *Trends* shows a consistent reduction in the proportion of shoppers who have taken actions related to dissatisfaction with supermarkets. For five of the six items asked about, fewer shoppers report having taken the action this year than last year.

While returning products to a supermarket for a refund or exchange continues to be the most common of the six practices, only 41 percent of shoppers say they have done this, compared with 51 percent last year. In-person complaints also show a marked decline from 30 percent last year to 25 percent this year.

Switching supermarkets because of dissatisfaction has declined this year by three percentage points, from 20 percent to 17 percent, while telling friends or neighbors not to use a store has remained stable at 10 percent. Writing complaint letters and joining food co-ops continue to be very rare consumer practices, with four percent and two percent of shoppers reporting these two activities this year.

Table 21

ACTIONS SHOPPERS HAVE TAKEN ON SUPERMARKET-RELATED COMPLAINTS: 1981-1986

Base: The shopping public

Q.: In the past year, have you (READ EACH ITEM), or not?

	Total					
	Jan. 1981	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	**Jan. 1986**
	%	%	%	%	%	%
Yes, Have:						
Returned products to a supermarket for a refund or exchange	57	53	52	56	51	41
Made an in-person complaint to a food store or supermarket manager	41	33	32	35	30	25
Switched supermarkets because you were dissatisfied	34	22	21	24	20	17
Told a friend or neighbor to stop going to a particular store or supermarket	22	13	12	14	10	10
Written a letter of complaint to a food manufacturer or supermarket	8	7	6	9	8	4
Joined a food co-op in your area	4	2	3	4	3	2

CHAPTER 5

NUTRITIONAL CONTENT AND FOOD SAFETY

Nutritional Content

Shoppers' concern about the nutritional content of food appears to have remained stable. Last year 59 percent of shoppers stated that they were very concerned about the nutritional content of what they eat, whereas this year 58 percent express the same level of concern. While slightly over a third (35 percent) of all shoppers are somewhat concerned about nutrition, the proportion of shoppers who are not very or not at all concerned has remained low at seven percent this year.

Since last year men and women have become more similar in their expressed level of concern — 55 percent of men and 58 percent of women say they are very concerned — however, the proportion of men who say they are not very concerned or not at all concerned is relatively high (11 percent) as compared to women (five percent). Substantial changes have also occurred for several other subpopulations. Both urban and suburban shoppers' degree of concern declined this year to 55 percent. In contrast, rural shoppers' level of concern increased this year to 65 percent, up 12 percentage points from last year.

Over the course of the past three years the proportion of those who say they are very concerned has declined for the three youngest age groups. Since 1983, there has been a six percentage point reduction to 55 percent of the 18- to 24-year-old group, a 10 percentage point reduction to 54 percent of the 25- to 39-year-old group, and a 12 percentage point reduction to 49 percent of the 40- to 49-year-old group. Those 50 to 64 and 65 and over have remained stable at 68 percent and 65 percent respectively.

Among those shoppers expressing any concern about the nutritional content of what they eat, the number of specific concerns has increased slightly since last year. The most often mentioned concern in 1983 and in 1984 was the potential harm of chemical additives. The percentage of shoppers mentioning this type of concern had dropped steadily from 27 percent in 1983, to 25 percent in 1984, to 18 percent last year, to 16 percent this year. This year vitamin and mineral content (22 percent) was most likely to be of concern, followed by salt content (20 percent).

Other frequently mentioned concerns have dropped over the past three years. Mentions of concerns about the sugar content of food have declined from 21 percent to 18 percent; preservative concerns have declined from 22 percent to 15 percent, freshness concerns from 14 percent to eight percent, and concerns about foods being "natural" from 12 percent to three percent. On the other hand, concerns about fat content have picked up from nine percent in 1983 to 17 percent this year and cholesterol-related mentions have increased from five percent to 13 percent.

Table 22 LEVEL OF SHOPPERS' CONCERN ABOUT THE NUTRITIONAL CONTENT OF FOODS

Base: The shopping public

Q.: Would you say you and your family are very concerned, somewhat concerned, not very concerned, or not at all concerned about the nutritional content of what you eat?

					1986			
		1983 Very Concerned	1984 Very Concerned	1985 Very Concerned	Very Concerned	Somewhat Concerned	Not Very/ Not at All Concerned	Not Sure
Total	%	**64**	**63**	**59**	**58**	**35**	**7**	*
Sex								
Men	%	62	62	51	55	34	11	*
Women	%	65	64	60	58	36	5	1
Working	%	63	64	60	54	40	5	*
Nonworking	%	68	63	62	62	31	6	1
Type of Family								
With children	%	65	62	62	57	36	6	1
No children	%	63	64	56	58	34	7	*
Age								
18-24 years	%	61	51	52	55	43	2	0
25-39 years	%	64	58	56	54	41	5	*
40-49 years	%	61	67	63	49	41	11	0
50-64 years	%	68	71	62	68	25	6	1
65 and over	%	65	67	58	65	23	10	2
Size of Place								
Central city	%	71	71	61	55	36	8	1
Remainder of metropolitan area	%	64	61	60	55	38	7	0
Outside metropolitan area	%	61	58	53	65	38	5	1
Region								
East	%	67	66	65	58	30	9	0
Midwest	%	56	63	53	53	33	5	1
South	%	66	62	59	59	41	6	1
West	%	69	59	57	62	34	5	1

*Less than 0.5 percent.

Table 23

NATURE OF SHOPPERS' CONCERN ABOUT THE NUTRITIONAL CONTENT OF FOOD (VOLUNTEERED)

Base: The shopping public

Q.: What is it about the nutritional content of what you eat that concerns you and your family the most? What else?

	1983 Total %	1984 Total %	1985 Total %	1986 Total %
Vitamin/mineral content	24	19	17	22
Salt content, less salt	18	17	19	20
Sugar content, less sugar	21	22	20	18
Fat content, low fat	9	8	13	17
Chemical additives (e.g., flavoring, MSG, steroids)	27	25	18	16
No preservatives	22	17	13	15
Making sure we get a balance diet	10	9	11	14
Cholesterol levels	5	8	10	13
Food/nutritional value	10	19	14	11
Calories, low calories	6	9	9	11
Freshness, purity, no spoilage	14	12	8	8
Desire to be healthy/eat what's good for us	0	0	3	6
No harmful ingredients, nothing that causes illness/cancer	10	6	5	5
Protein value	5	6	4	5
As natural as possible, not overly processed	12	6	5	3
Fiber content	2	1	2	3
Empty calories, junk food	4	4	5	2
Excess food coloring/dyes	6	4	3	2
Carbohydrate content	1	2	2	2
Less red meat	0	0	2	2
Artificial sweetener	0	0	2	1
Quality of food	3	5	1	1
Starch content	1	1	1	1
Other	2	4	1	5
Don't know/refused	5	5	6	5

Nutrition-Related Behavior

This year *Trends* again examined the frequency with which shoppers perform a number of nutrition-related activities. About three out of every four shoppers report that they frequently serve nutritional snacks, such as fruits and vegetables (73 percent), and frequently select foods to ensure a balanced diet for their family (72 percent). Roughly half (51 percent) frequently check government grading on meats and poultry, and frequently (47 percent) check food labels for protein and fat content. Shoppers are less likely to frequently select recipes for their nutritional content, check food labels for protein and fat content (44 percent) or to avoid buying products with no nutritional information (35 percent). Of the seven activities asked about, reading articles and books on nutrition is the least frequently practiced activity, reported by 28 percent of shoppers.

While shoppers may vary in terms of how often they perform these activities, it is worth noting that very few seem to be totally unconcerned about nutrition. Avoiding buying products that have no nutritional information is the least common behavior with 19 percent of shoppers saying they never do this.

This year's *Trends* shows a very consistent pattern of increased nutrition-related behavior. For six out of seven items shoppers report more frequent performance of them. The most dramatic increase occurred for the checking of government grading on meats and poultry. This year 51 percent of shoppers say they frequently do this — a six percentage point increase over last year. Shoppers are also more likely this year to select recipes for their nutritional content (44 percent vs. 40 percent).

Table 24 **CONSUMER BEHAVIOR RELATED TO NUTRITION**

Base: The shopping public

Q.: How often do you (READ EACH ITEM) - frequently, occasionally, rarely, or never?

		1985	1986				
		Frequently	Frequently	Occasionally	Rarely	Never	Not Sure
Serve nutritional snacks,such as fruits & vegetables	%	72	73	21	4	2	*
Select foods to balance family's diet	%	70	72	20	4	4	*
Check government grading on meats and poultry	%	45	51	20	15	13	*
Check food labels for protein and fat content	%	45	47	29	13	11	*
Select recipes for their nutritional content	%	40	44	32	14	9	1
Avoid buying products that have no nutritional information	%	35	35	24	19	19	2
Read articles and books on nutrition	%	25	28	39	18	15	*

*Less than 0.5 percent.

Ensuring Food Safety

This year's *Trends* shows a return to previously high levels of shoppers' self-reliance (48 percent) to ensure the safety of the products they buy, This action has increased 10 percentage points since last year. A high proportion of shoppers continue to rely primarily on the Federal Government (29 percent), reflecting a five percentage point increase over three years. Reliance on consumer organizations has increased somewhat during that same period, reaching nine percent this year, while reliance on manufacturers has dropped by five percentage points to eight percent. Only two percent of shoppers rely mostly on retailers.

Table 25

THOSE WHOM SHOPPERS RELY ON TO ENSURE THAT THE PRODUCTS THEY BUY ARE SAFE: 1983-1986

Base: The shopping public

Q.: As far as you personally are concerned, whom do you rely on most to be sure that the products you buy are safe — the federal government, the state government, consumer organizations, manufacturers, retailers, or yourself as an individual?

	Total			
	1983	1984	1985	1986
	%	%	%	%
Yourself as an individual	46	48	38	48
Federal government	24	22	31	29
Consumer organizations	6	9	8	9
Manufacturers	13	11	7	8
State government	3	3	6	4
Retailers	5	5	6	2
Other (vol.)	*	1	1	*
None (vol.)	1	*	1	*
Not sure	2	1	2	*

*Less than 0.5 percent.

Concern When Eating Out

This year's *Trends* expanded the investigation of nutritional concerns and food safety to include concerns about the food's ingredients when eating out. Overall, 28 percent of shoppers report being very concerned and another 46 percent report being somewhat concerned, while only seven percent report being not at all concerned.

Men (29 percent) and shoppers in families with no children (30 percent) are slightly more likely than are others to report (30 percent) are slightly more likely than are others to report being very concerned. The most important subgroup differences occur by size of place. Shoppers in the central city are most often very concerned (32 percent), but are also more likely than those in other kinds of locations to report being not at all concerned (10 percent) about the ingredients in food eaten out of the home. Those in rural areas are the least likely to be very concerned (24 percent).

Table 26 **CONCERN ABOUT FOOD INGREDIENTS WHEN EATING OUT**

Base: The shopping public

Q.: When you eat out, how concerned are you about the food's ingredients? Would you say very concerned, somewhat concerned, not very concerned, or not at all concerned?

	Jan. 1986 Base		Very Concerned	Somewhat Concerned	Not Very Concerned	Not At All Concerned	Not Sure
Total	**1004**	%	**28**	**46**	**19**	**7**	**1**
Sex							
Men	404	%	29	42	19	9	1
Women	600	%	27	47	19	6	1
Working	302	%	27	50	18	5	0
Nonworking	298	%	28	45	19	7	2
Type of Family							
With Children	482	%	25	49	19	7	1
No Children	517	%	30	44	18	6	1
Size of Place							
Central city	304	%	32	42	14	10	2
Remainder of metropolitan area	459	%	27	48	20	4	*
Outside metropolitan area	241	%	24	47	21	8	1

*Less than 0.5 percent.

Consumer Behavior and Food Safety

This year's *Trends* shows a renewed level of shopper self-reliance with regard to food safety. Shoppers continue to report a willingness to put this self-reliance into practice in the supermarket. This year, as last, almost nine out of 10 shoppers (88 percent) say that the statement "I usually check the packaging of the foods I buy to make sure it is in good condition" describes them very closely. In 1983, 85 percent of shoppers closely identified with this statement. Shoppers also regularly check the dates on dated food, with eight out of 10 shoppers (80 percent) stating that this behavior describes them very closely — up four percentage points since 1983. Just under half of all shoppers (46 percent) very closely identify with the concern that some ingredients added to processed food may be harmful or unsafe to eat, down two percent from last year. The percentage of shoppers who avoid buying certain foods because they are concerned about whether they are safe is 45 percent, down slightly from the level reported in the past three years. Fewer shoppers, but a still substantial minority, closely identify with the statement "I pay a good deal of attention to the list of ingredients on food labels." This year and the past three years, four out of 10 shoppers (41 percent or 40 percent) feel this statement describes them very closely. This year as last 58 percent very closely identify with the statement "I feel that the food in supermarkets is wholesome and safe to eat." Only seven percent say this statement does not very closely or not at all describe them.

Table 27 **CONSUMER BEHAVIOR AND FOOD SAFETY**

Base: The shopping public

Q.: The following are statements that other people have made. For each one, please tell me how close it comes to describing you — very close, somewhat close, not very close, or not at all.

		1983 Very Close	1984 Very Close	1985 Very Close	1986 Very Close	1986 Somewhat Close	1986 Not Very Close	1986 Not at All	1986 Not Sure
I usually check the packaging of the foods I buy to make sure it is in good condition	%	85	87	88	88	8	2	1	*
I almost always check the dates on dated foods	%	76	79	78	80	11	6	3	*
I feel concerned that some ingredients added to processed foods may be harmful or unsafe to eat	%	50	47	48	46	29	15	8	1
I avoid buying certain foods because I am concerned about whether they are safe	%	46	46	46	45	24	16	15	1
I pay a good deal of attention to the list of ingredients on food labels	%	41	40	40	41	30	19	10	*
I feel the food in supermarkets is wholesome and safe to eat	%	x	x	58	58	34	5	2	*

*Less than 0.5 percent.
x = Not asked

Concerns About Specific Food Attributes

This year, for the third year in a row, *Trends* asked shoppers to indicate the extent to which they felt certain items in food were hazardous. This year's responses evidence a small amount of fluctuation in the degree of shopper concern, although the ordering of these items according to the shopper's degree of concern remains unchanged.

Three out of four shoppers (75 percent) consider residues such as pesticides and herbicides to be a serious health hazard. Although down two percentage points from 77 percent in 1984, such residues are still perceived to be the most hazardous item about which shoppers were asked. Only four percent of shoppers say such residues are not a problem at all. Forty-eight percent of shoppers consider cholesterol in food to present a serious health hazard, making this concern second in order of seriousness. The presence of fat in food is also perceived to be a serious health hazard by better than four in 10 shoppers (44 percent). Both show a slight increase in concern over last year of four percentage points for the former and two points for the latter. For all three highest ranked concerns, at least 94 percent of shoppers share some level of concern about the item. Shoppers' concerns about salt in food, and about additives and preservatives, have also increased slightly this year. Four shoppers in 10 consider salt a serious health hazard, while fewer express a similar level of concern about additives and preservatives (33 percent).

Last year *Trends* began to investigate public attitudes toward the use of irradiation as a preserving method. In January, 1985, less than one-third (29 percent) of shoppers had heard of the technique. Of those who were knowledgeable about irradiation, irradiation was preferred to chemical preservatives. This year shoppers expressed lower levels of concern about the use of irradiation than about additives and preservatives, with 76 percent expressing some concern about irradiation and 91 percent expressing some concern about the risks associated with additives and preservatives. The relatively high level of "not sure" responses this year with regard to irradiation (11 percent) reflects last year's finding that a large number of shoppers have never heard of this technique.

Table 28 **CONSUMER CONCERN ABOUT SELECTED FOOD ATTRIBUTES: 1984-1986**

Base: The shopping public

Q.: How concerned are you about the following items being in food? Would you say that (READ EACH ITEM) (is/are) a serious health hazard, somewhat of a hazard, or not a hazard at all?

Q.: Would you say that the use of irradiation to preserve and sterilize food is a serious health hazard, somewhat of a hazard, or not a hazard at all?

				1986			
		1984 Serious Hazard	1985 Serious Hazard	Serious Hazard	Something of a Hazard	Not a Hazard at All	Not Sure
Base: 1004							
Residues, such as pesticides and herbicides	%	77	73	75	20	4	2
Cholesterol	%	45	44	48	46	4	1
Fats	%	x	42	44	52	4	1
Salt in food	%	37	39	40	52	7	1
Additives and preservatives	%	32	36	33	58	8	1
Irradiation	%	x	x	37	39	13	11
Sugar in food	%	31	29	29	57	12	1
Artificial coloring	%	26	28	26	53	20	2

x = Not asked.

CHAPTER 6

NEW PRODUCTS AND SERVICES

Availability

The increasing availability of new products and services in supermarkets led *Trends* to investigate shoppers' use of a wide range of such products and services. Overall, shoppers report widespread availability of the 11 products and services about which they were asked. More than half of all shoppers report the availability of seven items in their most often shopped supermarket.

The two most commonly available items are unbranded or generic products (87 percent) and food products designed especially for microwave cooking (86 percent). Three-fourths (74 percent) of the shoppers report the availability of delicatessen or other carry-out items as well. Also reported to be available by more than one-half of shoppers are gourmet or specialty foods (70 percent), fresh partially prepared foods which require less time to prepare at home (63 percent), unpackaged or bulk foods (54 percent) and items from a salad bar (51 percent). Relatively high proportions of shoppers are not sure about the availability of foods for microwave cooking (nine percent) and automated teller machines (11 percent).

There is some tendency for new product and service availability to vary according to the kind of area in which shoppers reside. Generally there are not major differences between the experiences of shoppers in the central city and those in the remainder of the metropolitan area. Gourmet and specialty foods are somewhat more likely to be available in the central city than in the suburbs (76 percent vs. 70 percent). Supermarket shoppers in rural areas, however, are substantially less likely to have available delicatessen or other carry-out food items (67 percent rural vs. 76 percent urban and 78 percent suburban), gourmet or specialty foods (62 percent vs. 76 percent and 70 percent), unpackaged or bulk foods (44 percent vs. 55 percent and 58 percent), food catering (38 percent vs. 38 percent and 40 percent) and automated teller machines (20 percent vs. 39 percent and 36 percent).

Table 29 **AVAILABILITY OF NEW PRODUCTS AND SERVICES**

Base: The shopping public

Q.: (1986) Thinking about the supermarket where you do most of your shopping, does it carry/have (READ EACH ITEM)?

		1986		
		Yes	No	Not Sure
Base: 1004				
Unbranded or generic products	%	87	11	3
Food products designed especially for microwave cooking	%	86	5	9
Delicatessen or other carry-out food items	%	74	24	1
Gourmet or specialty foods	%	70	25	5
Fresh partially prepared foods that require less time to prepare at home	%	63	30	7
Unpackaged or bulk foods	%	54	40	6
Items from a salad bar	%	51	47	2
Fresh, not frozen, pizza	%	47	47	6
Food catering	%	38	56	6
Automated teller machines	%	33	56	11
Home shopping and delivery service for groceries	%	7	86	7

Table 30 **AVAILABILITY OF NEW PRODUCTS AND SERVICES BY SIZE OF PLACE**

Base: The shopping public

Q.: (1986) Thinking about the supermarket where you do most of your shopping, does it carry/have (READ EACH ITEM)?

		Jan. 1986 Total	Inside Central City	Inside SMSA	Outside SMSA
Base:		1004	304	459	241
Percent saying yes:					
Unbranded or generic products	%	87	86	87	87
Food products designed especially for microwave cooking	%	86	86	86	86
Delicatessen or other carry-out food items	%	74	76	78	67
Gourmet or specialty foods	%	70	76	70	62
Fresh partially prepared foods that require less time to prepare at home	%	63	66	62	63
Unpackaged or bulk foods	%	54	55	58	44
Items from a salad bar	%	51	53	51	48
Fresh, not frozen, pizza	%	47	46	49	45
Food catering	%	38	38	40	33
Automated teller machines	%	33	39	36	20
Home shopping and delivery service for groceries	%	7	9	6	8

Using New Products and Services

Shoppers who say they have available a new product or service were asked about the frequency with which they use the product or service. One-third (33 percent) of the shoppers having automated teller machines available say they are frequently used. One-fourth (25 percent) frequently purchase delicatessen or other carry-out food items. Unpackaged or bulk foods (22 percent) and items from a salad bar (20 percent) are also frequently used by at least one out of five shoppers who have them available.

Of the 11 new products and services, eight are used at least occasionally by more than four out of 10 shoppers. The three items not used this often are fresh, not frozen, pizza, with at least occasional use by 31 percent of shoppers, home shopping and delivery service (23 percent) and food catering (13 percent). These findings reflect a generally widespread acceptance of and desire for the expanding role of supermarkets in the marketplace.

Table 31 **SHOPPER'S USE OF NEW PRODUCTS AND SERVICES**

Base: The shopping public who say their supermarkets have the product or service.

Q.: (1986) How often do you use/purchase (READ EACH ITEM)? Would you say frequently, occasionally, rarely, or never?

	Jan. 1986 Base		Frequently	Occa-sionally	Rarely	Never	Not Sure
Automated teller machines	327	%	33	14	9	44	0
Delicatessen or other carry-out food items	745	%	25	38	23	15	0
Unpackaged or bulk foods	539	%	22	37	21	19	1
Items from a salad bar	511	%	20	25	20	35	0
Food products designed especially for microwave cooking	859	%	18	25	15	42	*
Unbranded or generic products	867	%	16	36	22	25	*
Fresh partially prepared foods that require less time to prepare at home	630	%	14	35	27	24	0
Home shopping and delivery service for groceries	70	%	10	13	11	66	0
Gourmet or specialty foods	697	%	8	40	29	23	*
Fresh, not frozen, pizza	466	%	6	25	26	42	1
Food catering	378	%	3	10	21	66	0

*Less than 0.5 percent.

Potential Use of New Products and Services

Shoppers who report a current lack of availability of the 11 new products and services were asked about the likelihood of their using or purchasing the item if it were available in their supermarket. Once again, consumers demonstrated a high level of acceptance.

More than one-half of the shoppers (57 percent) expect they would purchase delicatessen or other carry-out food items at least occasionally. Forty-four percent of those who do not have available fresh, partially prepared foods that require less time to prepare at home and fresh, not frozen, pizza think they would purchase such items at least occasionally. Over one-third (36 percent) expect they would at least occasionally use automated teller machines if they were available.

Table 32 **POTENTIAL USE OF NEW PRODUCTS AND SERVICES**

Base: The shopping public who say their supermarkets do not have the product or service.

Q.: (1986) If your supermarket carried/had (READ EACH ITEM), how often do you think you would use/purchase it? Would you say frequently, occasionally, rarely, or never?

	Jan. 1986 Base		Frequently	Occa-sionally	Rarely	Never	Not Sure
Automated teller machines	562	%	15	21	21	38	5
Delicatessen or other carry-out food items	241	%	13	44	20	23	1
Unpackaged or bulk foods	405	%	9	30	23	36	2
Items from a salad bar	464	%	8	28	26	38	0
Food products designed especially for microwave cooking	52	%	7	25	18	47	3
Unbranded or generic products	107	%	8	34	20	36	2
Fresh partially prepared foods that require less time to prepare at home	299	%	8	36	26	30	*
Home shopping and delivery service for groceries	861	%	8	14	19	58	1
Gourmet or specialty foods	250	%	4	31	31	34	1
Fresh, not frozen, pizza	470	%	7	37	21	34	1
Food catering	559	%	3	13	28	56	0

*Less than 0.5 percent.

CHAPTER 7

DINNER EATING PATTERNS

Meals Not Prepared at Home

In response to an increasing desire on the part of the public to minimize food preparation time, this year's *Trends* investigated changing practices with regard to meal preparation. Shoppers were asked about the location of the purchase of food for "meals eaten at home but not prepared at home." The most often used source is a fast food store (43 percent) followed closely by the carry-out section of a restaurant (38 percent). The carry-out section of a supermarket is much less likely (10 percent) to be the source for these types of meals. A small number of shoppers (four percent) said that this question did not apply to them, indicating that meals eaten at home were always prepared at home.

The source of the food for meals eaten but not prepared in the home differs for households of different sizes. One-person households are more likely than are larger households to purchase such food in the carry-out section of a supermarket (13 percent) or some other place (six percent). They are less likely to use the carry-out section of a restaurant (32 percent) or a fast food store (29 percent) than are larger households.

Conversely, shoppers from large households with five or more people are more likely than are others to purchase prepared food for home consumption at a fast food store (50 percent) or the carry-out section of a restaurant (39 percent). They are least likely to make such a purchase in the carry-out section of a supermarket (five percent).

Table 33 **SOURCE OF TAKE-OUT FOOD**

Base: The shopping public

Q: (1986) When meals are eaten at home, but not prepared at home, where do you usually buy the food? Would you say most often from a fast food store, a carry-out section of a restaurant, a carry-out section of a supermarket or from some other place?

	Jan. 1986 Total	Size of Household				
		1	2	3	4	5 or more
Base:	1004	123	328	194	212	142
	%	%	%	%	%	%
Fast food store	43	29	39	44	49	50
Carry-out section of a restaurant	38	32	37	41	38	39
Carry-out section of a supermarket	10	13	12	9	8	5
Some other place	2	6	1	2	1	1
None/not applicable (vol.)	4	6	6	1	3	2
It varies (vol.)	1	1	2	1	1	1
Not sure	3	13	3	2	1	3

Dining Practices

This year *Trends* also sought to investigate patterns and variations in the consumption of the evening meal. Most shoppers report maintaining relatively traditional dining practices. A high proportion of shoppers report that their family always (52 percent) or usually (19 percent) eats dinner together. The family is also always (46 percent) or usually (16 percent) likely to have the same main course when eating dinner together. Few shoppers say their family rarely eats the evening meal together (six percent) or rarely shares the same main course (seven percent).

Other dining practices are engaged in much less often by shoppers. Only 13 percent say they always (four percent) or usually (nine percent) have dinners where new recipes are tried. Almost one-fourth (24 percent) say this is rarely the case.

When asked about the prevalence of dinners where guests are entertained, seven percent report they usually have dinner guests and 58 percent report they occasionally entertain guests for dinner. Almost one-third (32 percent) of shoppers say they rarely have dinners where guests are entertained.

In addition to investigating dining practices for the total sample, results were also examined by household size, whether shoppers lived in urban, suburban or rural areas, and by region of the country. Household size does not appear to have any consistent impact on dining practices. Five-person households are the most likely to report always or usually eating dinner together (84 percent), but two-person households are more likely to eat together (82 percent) than either three- or four-person households (75 and 76 percent). Single-person households are the least likely to always or usually have dinners where new recipes are tried (eight percent) or where guests are entertained (two percent). The likelihood of having the same main course is relatively stable across household size.

Families who live in the central city are least likely to eat dinner together (67 percent) and also the least likely to have the same main course (55 percent). In contrast families living in the suburbs are the most likely to eat dinner together (75 percent) and also the most likely to have the same main course (66 percent). Suburban shoppers are also more likely (15 percent) than urban shoppers (12 percent) or rural shoppers (nine percent) to try new recipes. Rural shoppers are the least likely (four percent) to always or usually have dinners where guests are entertained. This compares to nine percent of urban shoppers and 10 percent of suburban shoppers.

By region of the country, the subgroup most likely to always or usually eat dinner together are shoppers living in the East (77 percent). This is six percentage points above the overall sample result of 71 percent. Eastern shoppers also most often eat the same main course when they eat together. This subgroup's 71 percent "always or usually" figure is nine percentage points above the total sample result of 62 percent. Having dinners where new recipes are tried is most common among Easterners (17 percent) and least common among shoppers living in the Southern region (nine percent). There is less variation by region in the frequency of entertaining guests. Shoppers in the West most often report always or usually having these types of dinners (11 percent), while shoppers in the South are the least likely to entertain guests (six percent).

Table 34 **DINING PRACTICES**

Base: The shopping public

Q: How often (READ EACH ITEM) -- Would you say always, usually, occasionally, or rarely?

	1986				
	Always	Usually	Occa-sionally	Rarely	Not appli-cable (vol.)
Base: 1004	%	%	%	%	%
Does your family eat dinner together	52	19	15	6	8
Does your family have the same main course when you eat dinner together	46	16	23	7	7
Do you have dinners where new recipes are tried	4	9	61	24	1
Do you have dinners where you entertain guests	2	7	58	32	1

Table 35 VARIATIONS IN DINING PRACTICES BY SIZE OF HOUSEHOLD

Base: The shopping public

Q.: How often (READ EACH ITEM) — Would you say always, usually, occasionally or rarely?

	Jan. 1986	Size of Household				
	Total	One	Two	Three	Four	Five or more
Base	1004	123	328	194	212	142
	%	%	%	%	%	%
Always or Usually						
Does your family eat dinner together	71	NA	82	75	76	84
Does your family have the same main course when you eat together	62	NA	67	66	70	66
Do you have dinners where new recipes are tried	13	8	14	18	9	15
Do you have dinners where you entertain guests	9	2	8	11	9	9

Table 36 VARIATIONS IN DINING PRACTICES BY SIZE OF PLACE

Base: The shopping public

Q.: How often (READ EACH ITEM) — Would you say always, usually, occasionally, rarely?

	Jan. 1986	Size of Place		
	Total	Central city	Inside SMSA	Outside SMSA
Base	1004	304	459	241
	%	%	%	%
Always or Usually				
Does your family eat dinner together	71	67	75	70
Does your family have the same main course when you eat together	62	55	66	61
Do you have dinners where new recipes are tried	13	12	15	9
Do you have dinners where you entertain guests	9	9	10	4

Table 37 **VARIATIONS IN DINING PRACTICES BY REGION**

Base: The shopping public

Q.: How often (READ EACH ITEM) — Would you say always, usually, occasionally, rarely?

	Jan. 1986	Region			
	Total	East	Midwest	South	West
Base	1004	250	251	311	192
	%	%	%	%	%
Always or Usually					
Does your family eat dinner together	71	77	67	69	73
Does your family have the same main course when you eat together	62	71	58	57	64
Do you have dinners where new recipes are tried	13	17	12	9	13
Do you have dinners where you entertain guests	9	8	10	6	11

METHODOLOGY

Selection of the Sample

The data for this survey were collected from 1,004 telephone interviews conducted from January 16 through 27, 1986. The sample was drawn from the noninstitutionalized civilian adult population of the United States, 18 years of age and older. Households contacted for the survey were selected by a procedure known as random digit dialing (RDD). This procedure ensures the inclusion of individuals with unlisted or not yet listed telephone numbers, as well as those with listed numbers, and thus provides a sample that reflects the total U.S. population.

Each household selected was screened first for the head of the household (either male or female), and then for that person's recent experience with shopping for groceries. Only heads of household who shopped for groceries in the previous two weeks were interviewed for the survey.

The final sample was controlled to consist of 60 percent female heads of household and 40 percent male heads of household in order to increase the reliability of the male shopper sample. However, the sample was weighted to an 80 percent female-20 percent male ratio to maintain comparability with previous studies in the *Trends* series. Aside from this stratification and weighting by sex, the sample is a national cross section of shoppers. Therefore, all subpopulation percentages (e.g., 28 percent living in a central city) are projectable to the American shopping public as a whole.

A profile of the total sample follows.

Table 38 **DEMOGRAPHIC PROFILE OF SUPERMARKET SHOPPERS: 1986**

Base: The shopping public

	Number in Sample	Unweighted Percentage in Sample	Weighted Percentage in Sample
		%	%
Total	1004	100	100
Sex			
Men	404	40	20
Women	600	60	80
Working women	302	30	40
Nonworking women	298	30	40
*Principal Shoppers**			
Total	721	72	81
Men	181	18	9
Women	540	54	72
Type of Household			
With children	482	48	50
Two wage earners	322	32	32

Table 38 (Continued) **DEMOGRAPHIC PROFILE OF SUPERMARKET SHOPPERS: 1986**

Base: The shopping public

	Number in Sample	Unweighted Percentage in Sample %	Weighted Percentage in Sample %
Age			
18-24 years	78	8	7
25-39 years	386	38	38
40-49 years	180	18	18
50-64 years	216	22	23
65 and over	116	12	11
Income			
$7,500 or less	87	9	10
$7,501-$15,000	143	14	15
$15,001-$25,000	195	19	19
$25,001 and over	519	52	50
Race			
White	837	83	84
Black	67	7	7
Hispanic	71	7	7
Marital Status			
Single/separated/divorced/widowed	286	28	28
Married	712	71	72
Education			
High school or less	500	50	53
Some college/college graduate	501	50	47
Size of Place			
Central city	304	30	28
Remainder of metropolitan area	459	46	47
Outside metropolitan area	241	24	26
*Region***			
East	250	25	26
Midwest	251	25	25
South	311	31	32
West	192	19	17

*Principal shoppers are those respondents who identified themselves as being the person in their household principally responsible for the weekly food shopping.

***East includes:* Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, and West Virginia.

Midwest includes: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.

South includes: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, and Virginia.

West includes: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming.

Note: Percentages may add up to less than 100 percent as a result of nonresponse.

Sampling Error

It is important to note that survey results are subject to sampling error, i.e., the difference between obtained results and those that would be obtained by studying the entire population. The size of this error varies with the size of the sample and with the percentage of respondents giving a particular answer. The following table shows the range of error for samples of four different sizes and at different percentages of response:

SAMPLE ERROR (±) AT 95 PERCENT CONFIDENCE LEVEL FOR SAMPLES OF FOUR DIFFERENT SIZES

Percentage Response	Size of Sample			
	1000	600	400	100
	%	%	%	%
10 (90)	1.9	2.4	2.9	5.9
20 (80)	2.5	3.2	3.9	7.8
30 (70)	2.8	3.7	4.5	9.0
40 (60)	3.0	3.9	4.8	9.6
50 (50)	3.1	4.0	4.9	9.8

This table can be used to determine the approximate sampling errors associated with results presented in the report. An example may serve to illustrate this process.

As shown in Table 4 of this report, 19 percent of those surveyed this year expect the cost of housing to "get a good deal more expensive or rise sharply." This percentage is based on the total sample of 1,004 shoppers. From the table above, the sampling error associated with a 20 percent response for a sample of 1,000 is plus or minus 2.5 percentage points. Applying this sampling error to the 19 percent response in Table 4, the true proportion of shoppers who feel that housing costs will "get a good deal more expensive or rise sharply" should be no less than 16.5 percent and no more than 21.5 percent.

Aside from knowing the sampling error of any given survey finding, one might also be interested in whether differences between certain percentage figures are a likely result of sample variation or due to real differences in the shopping population. For example in Table 31 there is an eight percentage point difference between the percent of shoppers who frequently purchase "unpackaged or bulk foods" (22 percent) and the percent of shoppers who use "fresh partially prepared foods that require less time to prepare at home" (14 percent). Although this eight percentage point difference seems large, it could be due to sampling error. To determine whether or not this is a true difference one needs to consider the number of people responding to each question as well as the particular percentages reported. In general, the larger the sample sizes, the less likely it is that a reported difference will be due to sampling error. Also, in general, the smaller the percentages of any two comparison groups, the more likely a given differential sample percentage will reflect true differences.

In the following table the minimum differential percentage that must occur to be considered real is shown for varying sample sizes and varying percent responses.

SAMPLING ERROR OF DIFFERENCE BETWEEN PROPORTIONS

Sampling Tolerances (at 95% Confidence Level) to
Use in Evaluating Differences Between Two Percentage Results

Approximate Sample Size of Two Groups Asked Question on Which Survey Results are Based	Approximate Magnitude of Results				
	Survey Percentage Results at 10% or 90%	Survey Percentage Results at 20% or 80%	Survey Percentage Results at 30% or 70%	Survey Percentage Results at 40% or 60%	Survey Percentage Results at 50%
1,000 vs. 1,000	3	4	4	4	4
500	3	4	5	5	5
300	4	5	6	6	6
200	5	6	7	7	8
100	6	8	9	10	10
500 vs. 500	4	4	6	6	6
300	4	6	7	7	7
200	6	7	8	8	8
100	7	9	10	11	11
300 vs. 300	5	6	7	8	8
200	5	7	8	9	9
100	7	9	10	11	11
200 vs. 200	6	8	9	10	10
100	7	10	11	12	12
100 vs. 100	8	11	13	14	14

Taking the previous example from Table 31, 630 shoppers were asked how often they use fresh partially prepared food, of whom 14 percent said frequently. A total of 539 shoppers was asked how often they use unpackaged or bulk food, of whom 22 percent said frequently. Both of these sample sizes are closest to the 500 sample size row of the table. The two percentages are closest to the 20 percent or 80 percent column. From the table the minimum difference between percentages that would be considered not due to sampling error is four percent. Because the difference between 14 percent and 22 percent is greater than this minimum, one can safely assume that shoppers do in fact more frequently use generic or bulk foods than they do fresh or partially prepared foods.

These figures account only for sampling error. Survey research is susceptible to other errors as well, such as data handling and interviewer recording. However, the procedures used by Louis Harris and Associates keep errors of this kind to a minimum.

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